# Candidate Filings

Before adding and approving a Candidate Filing for an election, you must have successfully set up the contest for which the candidate is filing and have a Contact Record for the candidate that is viewable to the jurisdiction adding that candidate. See the Contacts chapter for more information.

## Add a Candidate Filing

1.  Expand (+) the **Elections** node.

2.  Expand (+) the election to which you wish to add a candidate filing.

3.  Click the **Candidate Filings** node.

4.  Click the **New Candidate Filing** Quick Task to open the **CandidateFiling – Add** window.

5.  Click the **Address Book Icon** 📇 to the right of the **Candidate** box to open the **Contact Search** window.

6.  In the **Last name** box of the **Contact Search** window, type the candidate's last name.

7.  In the **First Name** box of the Contact Search window, type the candidate's first name.
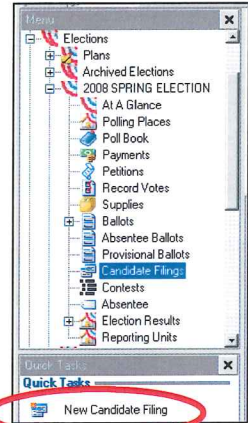
8.  Click **Search**.

9.  If the search results include the candidate's **Contact** record, double-click on that row in the data grid.

💡 *You can only use the Contact Search window to find a contact record that is "viewable" to your Active Jurisdiction. If the search results do not include the candidate's Contact record, close [x] the Contact Search window. You will need to create a new Contact record, or open the Contact record in its owning municipality and change the record to be viewable at the county or state level. See the Contacts chapter of this manual for more information on creating or editing Contact records.*

10. In the **Contest** box, click on the contest in which the candidate is running.

11. You will only change the **Party** if you are setting up a candidate for the September or November Election. The Candidate Filing record should now save the **Party** independently of what is listed in the **Contact** record.

12. The **GAB ID#** is used rarely , usually only for statewide candidates.

13. In the **Ballot Position** box, type a number corresponding to the candidate's position on the ballot for that contest, as determined by random draw.

14. If you use an identifying number for local candidates, you may choose to enter it in the **Local Cand No:** field.



15. Make sure the **Name on Balllot** reflects the name the candidate would like to appear on the ballot.

16. If you choose to track a candidate's filing details in SVRS, you will follow the optional steps below. You will enter data in the **Filing Checklist** and **Nomination Papers** sections of the **Candidate Filing** record, and may choose to print the **WI Nomination Paper Receipt**, the **WI Nomination Paper Sufficiency** form, or the **WI Nomination Paper Verification**. These steps are detailed in the next section.

17. If you do not choose to track candidate filings in SVRS, you only need to enter those candidates who will appear on the ballot. Make sure their **Status – Reason** is **Approved – Approved**.



18. **Save and Close**.

# (Optional) Track Candidate Filings Status in SVRS

As of September 2010, the GAB will be tracking Candidate Filing Status in SVRS, including all candidates who register, whether or not they eventually appear on the ballot. Counties and municipalities may choose to track candidate filings here as well.

1.  In the **Status-Reason** list box, the initial value will default to **Pending – Filing Period Open**.

2.  The **Incomplete Filing** and **Comments** fields may be used as appropriate.

**Filing Detail**

| | |
|---|---|
| Status-Reason: | Pending - Filing Period Open ▼ |
| Incomplete Filing: | ▼ |
| Comments: | ▲▼ |

3.  If you set up the **Office Type** to show items under the **Filing Checklist**, you will see items such as **Campaign Registration Statement**, **Declaration of Candidacy**, **Nomination Papers**, and **Statement of Economic Interests**. You will also see a **Deadline** date associated with each item, and a **Req?** checkbox indicating if the item is required.

**Filing Checklist**

Drag a column header here to group by that column

| O… | Description | Deadline | Completed | Amended… | Req? | Changed… | Changed… |
|---|---|---|---|---|---|---|---|
| ☑ | Campaign Registration Statement | 7/13/2010 | 6/1/2010 | 6/3/2010 | ☑ | harvea | 6/3/2010 |
| ☑ | Declaration of Candidacy | 7/13/2010 | 6/1/2010 | 6/3/2010 | ☑ | harvea | 6/3/2010 |
| ☑ | Nomination Papers | 7/13/2010 | 6/1/2010 | | ☑ | harvea | 6/3/2010 |
| ☐ | Statement of Economic Interests | 7/16/2010 | | | ☑ | | |

   a.  Please note when you set up your **Filing Checklist** items in the **Office Type** record, you must enter the **Description** exactly as shown in order to make the associated reports work.

   b.  You must update the filing deadlines in the **Office Type** record every election cycle.

   c.  You must check the checkbox at the far left of the item to save changes. The **Completed**, **Changed by User**, and **Changed Date** fields will update automatically. You can manually update the **Completed** or **Amended** columns.

4.  Under the Nomination Papers section, the number of signatures entered in the Office Type record will appear in the Required field.

   a.  You will first select the **Nomination Status** of **Submitted**.

   b.  Fill in the approximate number of signatures and pages.

   c.  Type in the person who submitted the petitions under **Submitted By** and your own name under **Staff Responsible**.

   d.  You should not enter a **Filing Receipt No**. That will be automatically generated by SVRS based on the election and the order in which the filing is received.

**Nomination Papers**

| | |
|---|---|
| Nomination Status: | Submitted ▼ |
| No. of Signature: | Required: 200 |
| Approximate: 400 | Valid: 0 |
| Approx. Pages: 40 | |
| Submitted By: | ERIC LEARN |
| Staff Responsible: | DIANE LOWE |
| Filing Receipt No: | 2010GENEL-5 |
| ☐ Supplemental | Suppl Submitted Date: ▼ |
| Created Date: 5/12/2010 ▼ | Date Last Changed: 5/12/2010 ▼ |

   e.  If the candidate turns in supplemental signatures, check the **Supplemental** checkbox and select a date in the **Suppl Submitted Date**.

5. To print the **WI Nomination Paper Receipt**:

a. Click the **Quick Tasks** button at the top of the form and select **Send Mailing** from the **Quick Tasks** panel.

b. In the **Mailings** drop-down, select **WI Nomination Paper Receipt**.

c. Click **Next**.

d. You do not need to filter or sort this mailing.

e. Check the **Printer Settings** and make sure that the document will be sent to the right printer.

f. Select the **Print Now** button and click **OK**.

g. A dialog box will appear asking "**Did the mailing print successfully?**" Click **Yes**. There will now be a record on the **Activity Tab** of the **Candidate Filing** record that the **WI Nomination Paper Receipt** was printed.

**Create Mailing**

**Select Mailing**

Category:
Candidate Filing

Mailings
WI Nomination Paper Receipt

Step 1 of 2    Next

**Create Mailing**

**Selected Mailing**
WI Nomination Paper Receipt

**Mailing Options**

Filter
[Selected Record...]    Custom

Sort By
[Select Sort]    Custom

Messages
[Select Message]    Custom

**More Mailing Options**
☐ Schedule Mailing
[Select Sch...]    Custom
☐ Auto-Confirm Print?

**Print Options**
Printer Settings
○ Preview
⊙ Print Now
○ Queue for Later Printing

OK

**Accenture.AES.AESM.UIComponents**

Did the mailing print successfully?

Yes    No

h. A sample of the report is shown to the right.

**Wisconsin Government Accountability Board**
**Nomination Paper Receipt**

Nomination Paper Receipt No.:  2010GENEL-5

Wisconsin Government Accountability Board
212 E WASHINGTON AVE
P.O. BOX 7984
MADISON, WI 53707-7984
(608) 267-8005

Candidate ID # :
Candidate Name :  ALLISON COAKLEY
Address 1 :  1308 MATHYS RD
Address 2 :
City, State, Zip :  Monona, WI  53716
Phone :

Election Date :  07/05/2010          Type :  Special Election
Office :  ADAMS COUNTY CIRCUIT COURT JUDGE
Party :  Non-Partisan

Date Filed Campaign Registration Statement :  June 3rd, 2010
Date Filed Declaration of Candidacy :  June 3rd, 2010
Date Filed Nomination Papers :  June 3rd, 2010
Approximate Number of Pages :  40
Approximate Number of Signatures :  400

Receptionist : _____

Agency Staff : _____

6.  To print the **WI Nomination Paper Sufficiency**:

    a.  Click the **Quick Tasks** button at the top of the **Candidate Filings** form and select **Send Mailings.**

    b.  In the Mailings dropdown, select **WI Nomination Paper Sufficiency**.

    c.  Click **Next**.

    d.  This mailing does not need to be filtered or sorted.

    e.  Check the **Printer Settings** and make sure that the document will be sent to the right printer.

    f.  Select the **Print Now** button and click **OK**.



    g.  A dialog box will appear asking "**Did the mailing print successfully?**" Click **Yes**. There will now be a record on the **Activity Tab** of the **Candidate Filing** record that the **WI Nomination Paper Sufficiency** was printed.

    h.  A sample of the report is shown to the right. You will attach this report to the petitions and use it to track several things, including the number of valid signatures. and if the number of signatures is insufficient.

    i.  **Save and Close** the **Candidate Filing** form. You will return to it when the number of signatures have been verified.

7. When the number of signatures has been verified, you will reopen the **Candidate Filing** record and change the **Nomination Status** to **Sufficient**. (In some cases you may choose **Insufficient** or **Sufficient with Supplemental**).

8. Enter the number of verified signatures in the **Valid** field.

9. Make sure that the candidate has met all the requirements in the filing checklist before you change the **Status Reason** to **Approved – Approved,**

10. To print the **WI Nomination Paper Verification**:

   a. Click the **Quick Tasks** button at the top of the **Candidate Filings** form and select **Send Mailings.**

   b. In the Mailings dropdown, select **WI Nomination Paper Sufficiency**.

   c. Click **Next**.

   d. This mailing does not need to be filtered or sorted.

   e. Check the **Printer Settings** and make sure that the document will be sent to the right printer.

   f. Select the **Print Now** button and click **OK**.

   g. A dialog box will appear asking "**Did the mailing print successfully?**" Click **Yes**. There will now be a record on the **Activity Tab** of the **Candidate Filing** record that the **WI Nomination Paper Verification** was printed.

*After you have printed all three types of Candidate Nomination Paper verification forms, you can go to the Activity Tab of the Candidate Filing record and verify that they were all printed. If you highlight one of the lines in the upper grid, you will see more information in the lower grid.*

h. A sample of the report is shown to the right. You will sign this document and transmit it to the candidate.

i. Make sure that the candidate has met all the requirements in the filing checklist before you change the **Status Reason** to **Approved – Approved,**

j. **Save and Close** the **Candidate Filing** form.

Wisconsin Government Accountability Board
Nathaniel E Robinson, Elections Division, Administrator
212 E WASHINGTON AVE
P.O. BOX 7984
MADISON, WI 53707-7984
(608) 267-8005

Candidate ID # :
ALLISON COAKLEY
1308 MATHYS RD
MONONA, WI 53716

This is to acknowledge receipt for the nomination papers of
**ALLISON COAKLEY**
FOR THE OFFICE OF ADAMS COUNTY CIRCUIT COURT JUDGE

Special Election to be held July 5th, 2010

Party Affiliation:  Non-Partisan

Nomination Papers filed    June 3rd, 2010

Declaration of Candidacy filed    June 3rd, 2010

Application for Public Funding filed    (Not Filed)

Statement of Economic Interest filed    (Not Filed)

Number of Valid Signatures:  382

This is number of valid signatures determined by the Government Accountability Board staff. This number is subject to challenge within 3 business days following the deadline for filing nomination papers.

Verified By  _____    Date:  May 12th, 2010

EB-152 (Rev. 5/2010)    Nomination Paper Receipt No.:  2010GENEL-5

# Search for and Update a Candidate Filing

☑ You can search for and update a candidate filing. Perhaps you noticed a name misspelling and need to correct the spelling.

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1. Expand **(+)** the **Elections** node.

2. Expand **(+)** the current election.

3. Click the **Candidate Filings** node.

4. On the search pane, enter search criteria and click **Search**.

5. In the data grid, double-click on the row for the candidate record you wish to update.

6. Make changes to the **CandidateFiling** record.

7. Click the **Save and Close** button.

💡 *Remember that once you have checked Milestone #3, you will be unable to change **Contests** and **Candidates** for that election. You must uncheck Milestone #3, make any changes, and recheck the milestone. If you are a county level user, and you need to change a contest or candidate, every municipality in your county must uncheck Milestone #3 before you can uncheck it at the county level.*